



# **BLSDM Evaluation Training**

**(AFI 36-2406, MPFM 07-44 & 07-45, AFI 36-2905)**



## **Overview:**

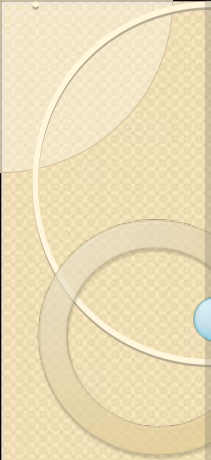
- Force Management Processes
- OPR/EPR Basics
- Fitness information
- Referral Reports
- Common mistakes/errors

-7 duty day turnaround on any e-mail request  
(BLSDM POC's need to make sure all information is included, effective date, and that it is all at the top of the e-mail together for us to update)

-2-3 duty day turnaround for all shell requests  
(once a shell has already been received any changes will be made manually by the BLSDM POC a new shell will not be re-ordered).

-EMS reports will be processed by order received  
(All evals meeting a promotion board have priority)

\*\*\* For stat purposes the rcvd at MPF date will be the final date we receive it, no longer the first time we receive it\*\*\*



**1. OPR/EPR information MUST match the shell (a report should not reach our office if the information does not match)**

**2. All blocks must be marked, complete all signature blocks to include SSAN last four, digital signatures, and dated on or after c/o date.**

**3. No signatures prior to the close out date of the report (must also go in order: rater, additional rater, reviewer (if applicable), commander)**

**4. No PME on SEPRs and no negative comments unless the report is a referral**

**5. follow checklist (hand out provided)**

**Q: What does Meet Standards mean?**

**A: On the close out date of a members OPR/EPR if they have passed their PT test then they have met standards (it does not matter if the member has failed 3 times prior)**

**Q: If a member failed their PT test, but passed before the close out date, and I still want to mark them down for fitness because they are not above and beyond, can I mark does not meet standards?**

**A: NO, the standard is to pass your PT test, if the member has passed you CANNOT mark them down in the fitness category for anything. They have met the standard.**

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2. STANDARDS, CONDUCT, CHARACTER & MILITARY BEARING *(For SSgt/TSgt also consider Enforcement of Standards and Customs & Courtesies)*  
 Consider Dress & Appearance, Personal/Professional Conduct On/Off Duty *(Limit text to 2 lines)*  
☐ Does Not Meet ☐ Meets ☐ Above Average ☐ Clearly Exceeds

3. FITNESS *(Maintains Air Force Physical Fitness Standards)* *(For referrals, limit text to 1 line)*  
☐ Does Not Meet ☐ Meets ☐ Exempt

4. TRAINING REQUIREMENTS *(For SSgt/TSgt also consider PME, Off-duty Education, Technical Growth, Upgrade Training)* Consider Upgrade,  
 Ancillary, OJT and Readiness *(Limit text to 2 lines)*  
☐ Does Not Meet ☐ Meets ☐ Above Average ☐ Clearly Exceeds

5. TEAMWORK/FOLLOWERSHIP *(For SSgt/TSgt also consider Leadership, Team Accomplishments, Recognition/Reward Others)* Consider Team  
 Building, Support of Team, Followership *(Limit text to 2 lines)*  
☐ Does Not Meet ☐ Meets ☐ Above Average ☐ Clearly Exceeds

6. OTHER COMMENTS *(Consider Promotion, Future Duty/Assignment/Education Recommendations and Safety, Security & Human Relations)* *(Limit text to 2 lines)*

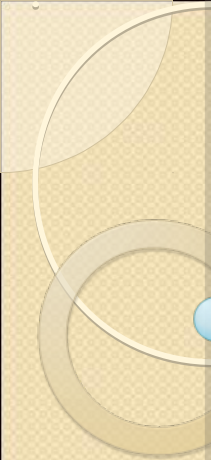
IV. RATER INFORMATION

NAME, GRADE, BR OF SVC, ORGN, COMMAND AND LOCATION	DUTY TITLE	DATE
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Also same on AF FM 911





**Q: What does “Does not meet standards” mean?**

**A: A member does not meet standards when they have not passed their PT test on the close out date of their report OR if they are not current on the close out date of their report.**

**\*\*it is your responsibility to keep current on PT testing\*\***

**Q: When is a member exempt?**

**A: A member MUST be exempt from all 4 categories (waist measurement, run/walk, push-ups and sit-ups) to have exempt marked on their report.**

## **Fitness Info Cont:**

- Members are also exempt if they are deployed to a location that does not have an authorized PT program.
- Member will automatically be considered "exempt" in the deployed location and their current FA expires.
- If member fails before deploying and their eval c/o out after the deployment starts, and the mbr has a current FA (failure), the mbr will be marked "DOES NOT MEET STANDARDS" unless they volunteer to test and receive a passing score prior to the c/o date of the evaluation. However, if a mbr reaches the 91-day mark after the FA (failure), but before the evaluation c/o, the Unsatisfactory score is no longer current and therefore the evaluation will be marked "exempt".





## **Fitness Info Cont:**

-OPR's have three blocks (Meets Standards, Does not Meets Standards, and Exempt) when an officer is PT exempt the Exemption block will say Yes and an "X" must still be placed in either the Meets Standards or Does not Meet standards block.

When an officer Does not Meet Standards and is not exempt from PT the Exemption block will stay blank.

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### OFFICER PERFORMANCE REPORT (Lt thru Col)

**I. RATEE IDENTIFICATION DATA** (Read AFI 36-2406 carefully before filling in any item)

1. NAME (Last, First, Middle Initial)	2. SSN	3. GRADE	4. DAFSC	5. REASON FOR REPORT	6. PAS CODE

7. ORGANIZATION, COMMAND, LOCATION, AND COMPONENT

8. PERIOD OF REPORT

9. NO. DAYS SUPV.

10. SRID

**II. JOB DESCRIPTION** (Limit text to 4 lines)

DUTY TITLE

**III. PERFORMANCE FACTORS**

	DOES NOT MEET STANDARDS	MEETS STANDARDS	FITNESS EXEMPTION
Job Knowledge, Leadership Skills, Professional Qualities, Organizational Skills, Judgment and Decisions, Communication Skills, and Physical Fitness (see reverse if marked Does Not Meet Standards)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**IV. RATER OVERALL ASSESSMENT** (Limit text to 6 lines)

Last performance feedback was accomplished on: \_\_\_\_\_ (IAW AFI 36-2406) (If not accomplished, state the reason)

NAME, GRADE, BR OF SVC, ORGN, COMMAND & LOCATION	DUTY TITLE	DATE
	SSN	SIGNATURE
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AF FM 707 (OPR)

**-59 day extension request (PT purposes):**

**This request must come from the SQ commander and is NOT automatic for all members who fail their PT test.**

**Commander MUST provide any/all medical documentation to help the members case with the extension request.**

**\*\*AFPC will come back and tell you if the request has been approved/disapproved and also the latest c/o date you can use, this does not mean you have to wait until that day. (ex: original c/o is 7 Aug, extension is approved for NLT 5 Oct 2010, the c/o date can get changed to 15 Aug and processed like normal)**

## **Fitness Info Cont:**

The following statement is mandatory in the feedback portion of the report when an extension has been used

“Close out date was extended IAW AFI 36-2406, para. 3.7.5 approved per e-mail from AFPC/DPSIDEP dtd DDMMYY.”

Q: Once an extension has been requested and approved, does the extension have to get used?

A: No, it is up to the rating chain if they want to use it or not.

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V. OVERALL PERFORMANCE ASSESSMENT			RATEE NAME: DOE, JOHN M.		
Overall Performance During Reporting Period					
ASSESSMENT	POOR (1)	NEEDS IMPROVEMENT (2)	AVERAGE (3)	ABOVE AVERAGE (4)	TRULY AMONG THE BEST (5)
RATER'S ASSESSMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ADDITIONAL RATER'S ASSESSMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Last feedback was performed on: 15 Nov 2009 If feedback was not accomplished in accordance with AFI 36-2406, state the reason.

Close out date was extended IAW AFI 36-2406, para. 3.7.5 approved per e-mail from AFPC/DPSIDEP dtd 1 Jan 2010.

VI. ADDITIONAL RATER'S COMMENTS (Limit text to 3 lines) ☒ CONCUR ☐ NON-CONCUR

NAME, GRADE, BR OF SVC, ORGN, COMMAND AND LOCATION DUTY TITLE DATE

SSN SIGNATURE

Click here to sign

VII. FUNCTIONAL EXAMINER/AIR FORCE ADVISOR ☐ FUNCTIONAL EXAMINER ☐ AIR FORCE ADVISOR

(Indicate applicable review by marking the appropriate box.)

NAME, GRADE, BR OF SVC, ORGN, COMMAND AND LOCATION DUTY TITLE DATE

SSN SIGNATURE

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# AF 910/911 Example

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### OFFICER PERFORMANCE REPORT (Lt thru Col)

**I. RATEE IDENTIFICATION DATA** (Read AFI 36-2406 carefully before filling in any item)

1. NAME (Last, First, Middle Initial)	2. SSN	3. GRADE	4. DAFSC	5. REASON FOR REPORT	6. PAS CODE
	- -				

7. ORGANIZATION, COMMAND, LOCATION, AND COMPONENT

8. PERIOD OF REPORT

THRU

9. NO. DAYS SUPV.

**II. JOB DESCRIPTION** (Limit text to 4 lines)

DUTY TITLE

**III. PERFORMANCE FACTORS**

	DOES NOT MEET STANDARDS	MEETS STANDARDS	FITNESS EXEMPTION
Job Knowledge, Leadership Skills, Professional Qualities, Organizational Skills, Judgment and Decisions, Communication Skills, and Physical Fitness (see reverse if marked Does Not Meet Standards)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**IV. RATER OVERALL ASSESSMENT** (Limit text to 6 lines)

Last performance feedback was accomplished on: 15 Nov 2009 (IAW AFI 36-2406) (If not accomplished, state the reason)

Close out date extended IAW AFI 36-2406, para 3.7.5 approved per e-mail from AFPC/DPSIDEP dtd 1 Jan 2010

NAME, GRADE, BR OF SVC, ORGN, COMMAND & LOCATION	DUTY TITLE	DATE
	SSN	SIGNATURE
		Click here to sign

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AF FM 707 Example



# **Referral Reports:**

## **What is a referral report?**

- An evaluation where an evaluator marks “Does Not Meet Standards” in any performance factor or when comments in the report, or the attachments, are derogatory in nature, imply/refer to behavior incompatible with or not meeting minimum acceptable standards of personal or professional conduct, character, judgment or integrity, and/or refer to disciplinary actions.

## • **Referring Evaluator Responsibilities:**

- Must hand carry the OPR/EPR with the referral memorandum to the ratee. Memorandum must include:
  - The ratings/comments that make the report a referral
  - Actions required by the ratee
  - Name and full physical address of the evaluator to whom the ratee may send comments
  - Time & Page limit for evaluator to receive comments
  - Statement regarding ratee's right to apply for review of the report (First Sgt/CC/Legal/MPS Advice)
  - Must obtain the ratee's acknowledgment of the report and memorandum
  - Sends the original report and referral memorandum to the next level evaluator for his/her review



- Must acknowledge the report/memorandum

- If ratee does not desire to comment, no further action is required. Ratee must sign a memo stating they elected not to provide comments. (Highly recommended to wait 10 calendar days anyways)

- If ratee submits comments, he/she has 10 calendar days to prepare comments for the next evaluator.

- If submitted, comments: should be brief (up to 10 pages, include attachments). Comments should not reflect on the character, conduct or integrity of the evaluator unless fully substantiated.

- Sends rebuttal comments and any attachments to the next evaluator

## **The Next evaluator Responsibilities:**

- Will consider the ratee's comments and renders his/her endorsement in the appropriate section whether or not comments were received. This must be his/her first line as per AF 36-2406:

1. I have carefully considered (Ratee's name) comments to the referral memo of (date)
2. Ratee elected not to provide comments to the referral memo of (date)
3. Comments from the ratee were requested but were not received within the required period.

-He/She will endorse and forward report and all attachments to the next evaluator or commander.

Ensure that:

- Referral memorandum is signed and dated by the ratee on the same date as the rater's signature, and date
- Ratee's comments are attached (if applicable), at least 10 calendar days elapsed since receipt of the referral memorandum, or there is a signed statement from the ratee electing not to provide comments.
- Date the rater signs the report, date of the memorandum and date the member acknowledges receipt match
- The evaluator listed in the memorandum is next on the evaluation (ex: rater is referring, additional rater would receive comments in the referral memo)



--only deployed members signature can be a scanned copy, all others must be original, only member's that are deployed can have scanned signatures, all others need to be "wet"

2. Full functional address for Next evaluator and ratee not included

3. Not on letterhead. Must be per AFPC. This is an official document being placed in the members records.

4. Evaluator named in referral memorandum is not the next evaluator in line on the report.

5. Next evaluator in line missing one of the three mandatory statements about ratee's comments

6. Comments not turned into MPS with report



## COMMON ORT/ER errors

1. OPR/EPR data does not match the shell
2. SSAN incorrect
3. Thru & From dates incorrect
4. last 4 of SSAN is missing
5. Feedback date is not within raters supervision, or the feedback date is within the reporting period and raters supervision and SQ makes a comment that the member was deployed from Jan-May) Comments are only allowed when a required feedback was NOT accomplished.